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APPLICATION PROGRAM MANAGEMENT: DATASETS AND DEADLINES

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APPLICATION PROGRAM MANAGEMENT: DATASETS AND DEADLINES

Leverage the functionality of a custom dataset to manage your application programs strategically.

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Agenda

- ▶ Benefits of using a custom dataset to manage application programs
- ▶ Creating a custom dataset
- ▶ Creating a custom entity to store program deadlines
- ▶ Connecting dataset information to the Slate application
- ▶ Building sustainable automations
- ▶ Strategies for maintaining and managing dataset records

BENEFITS OF USING A CUSTOM DATASET TO MANAGE APPLICATION PROGRAMS

Complexity of Application Programs

When an applicant selects a program it may have an impact on all of the following...

- ▶ Deadlines
- ▶ Checklist requirements
- ▶ Reference requirements
- ▶ Program contacts
- ▶ SIS data

Application Programs as Prompts

Storing application programs as prompts alone requires...

- ▶ Complex conditional logic to manage program availability, deadlines and more
- ▶ Constant and increasingly difficult updates to application pages to keep up with changes to program offerings
- ▶ Numerous and inefficient automations and application logic to manage program requirements and submission conditions

Application Programs as Dataset Records

Creating dataset records for application programs allows you to...

- ▶ Easily update program information and add new programs without having to adjust conditional logic in the Slate application
- ▶ Simplify application automations and submission conditions
- ▶ Connect the applicant's selection of an application program to the dataset record using the power of configurable joins

Application Programs as Dataset Records

PRO TIP: Concatenate degree and academic program prompts

- ▶ Bachelor of Arts
- ▶ Bachelor of Science
- ▶ Master of Arts
- ▶ Master of Science
- ▶ PhD
- ▶ Biology
- ▶ English
- ▶ History
- ▶ Nursing
- ▶ Physics

Application Programs as Dataset Records

PRO TIP: Concatenate degree and academic program prompts

- ▶ Biology (BS)
- ▶ Biology (MS)
- ▶ English (BA)
- ▶ English (PhD)
- ▶ History (BA)
- ▶ History (MA)
- ▶ Nursing (DNP)
- ▶ Nursing (PhD)
- ▶ Physics (BS)
- ▶ Physics (PhD)

CREATING A CUSTOM DATASET

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Program Dataset Structure

How do you establish a basic program record in Slate?

- ▶ **Program ID (Dataset Row Key)** - align with your external system
- ▶ **Program Title** - free text vs. prompt-based (recommended)
- ▶ **Program Contact Information** - custom fields vs. devices table (recommended)
- ▶ **Dataset Record Display Name** - rule automation to assign a name to the record
- ▶ **Custom Dashboard and Tabs** - display and edit information about the record

Program Title Field

Why should you use your existing program prompt list instead of a free text field?

Free Text Field 🙄

- ▶ Edit both the student-facing Prompts and the Program Title field separately if a program name changes.
- ▶ Field has no connection to Prompt categories, export codes, effective/expiration dates, etc.

Prompt-based Field 😊

- ▶ Make updates in the Prompts editor that cascade to the Program Title field, and therefore the Dataset Display Name Rule.
- ▶ Create join pathways from Dataset Records to Lookup Prompt settings in Queries and Reports.

PRO TIP: This methodology also applies to other custom Dataset fields.

Program Contact Information

Why should you leverage the existing Contact/Address tables instead of custom fields?

Custom Fields 😞

- ▶ Build and maintain settings on custom fields for required devices.
- ▶ Potential inconsistency in the way that functional users map this data on Forms.

Contact/Address tables 😊

- ▶ Slate has already done the work to create email, phone and address fields for you!
- ▶ Reduce the available options to only the standard Device mappings.

PRO TIP: This methodology also applies to other Dataset types.

LET'S GO TO SLATE

to establish a Program Dataset record

Other Program Dataset Fields

What other fields might you want to establish at the record level?

- ▶ **Program Details** - key information that does not change year-to-year
 - ▶ College or School, degree type
 - ▶ Format of study, enrollment load, campus locations
 - ▶ Concentrations available, combined degree options
 - ▶ *Checklist requirements?* 🤔
- ▶ **Slate Application Settings** - decentralized application logic management
 - ▶ Application Page Keys
 - ▶ Field requirements

BUT WHAT IF THE PROGRAM DETAILS
CHANGE EACH CYCLE...

...like application deadlines perhaps?

CREATING A CUSTOM ENTITY

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Adding Entities to your Program Dataset

What is an Entity anyway?

- ▶ **Custom tables** for grouped datapoints on records
 - ▶ Similar to existing tables for Contact/Address, Schools, Jobs, Sports, etc.
 - ▶ Replaces numbered fields—academic interests, scholarships, faculty advisors, etc.
- ▶ **Entities cannot exist independently**
 - ▶ Must be tied to Person, Application or Dataset records
 - ▶ A single Entity can be used with multiple Record types

Program Dates Entity Structure

How do you connect deadline dates with the Program Dataset for use in the Slate application?

- ▶ **Term** - use existing prompts
- ▶ **Deadline Date(s)** - free text, date format (YYYY-MM-DD)
- ▶ **Entity Widget on a Custom Tab** - pop-up where entry and management occurs
 - ▶ *PRO TIP: Don't forget to configure your Custom List Fields or you won't see the display!*

LET'S GO TO SLATE

to configure a Program Dates Entity

Other Program Dates Entity Fields

What other fields might you want to establish in this entity?

- ▶ **Open Date** - date the program begins accepting applications
- ▶ **Display Settings** - visibility of date on public-facing forms and landing pages

CONNECTING DATASET INFORMATION TO THE APPLICATION

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Linking Applications and Datasets

How do you connect the student's application program to the program dataset record?

- ▶ **Method 1: Related Dataset Row Field**
 - ▶ Configure the application-scoped program field as a related dataset row
 - ▶ Use a portal + application creation form with parameters to pre-fill the program on the Slate Application
 - ▶ Technically intensive application configuration, but creates 1:1 join pathway for ease of access to data
- ▶ **Method 2: Prompt-Based Field and Independent Subqueries**
 - ▶ Configure the application-scoped program field to store a single prompt value
 - ▶ Use subquery comparison filters to match application-scoped and dataset-scoped field values
 - ▶ Traditional field configuration, but more complex approach to querying

LET'S GO TO SLATE

to build dataset filters and exports

Linking Applications and Dataset-scoped Entities

How do you connect the student's application program to the appropriate deadline dates?

- ▶ **Method 1: Custom Base Join (recommended)**
 - ▶ Join from Dataset → Entity at the base of the query, and define the 1:1 relationship
 - ▶ Use a comparison filter to limit to the student's selected application term
 - ▶ *PRO TIP: Custom base joins are affectionately known as Jolene Joins at RHB*
- ▶ **Method 2: Unique Independent Subqueries**
 - ▶ Use subquery comparison filters to match application-scoped and entity-scoped field values

LET'S GO TO SLATE

to build entity filters and exports

Making Dataset and Entity Data Accessible

How do you make this information readily available to functional users?

- ▶ **Add commonly-used filters and exports to a Query Library**
 - Application scope vs. Dataset scope vs. Entity scope
 - Adding base joins for defined 1:1 relationships
 - Using subqueries to create “configurable” filters and exports
- ▶ **Application Program Details Query Library examples in RHB Academy Database**

BUILDING AUTOMATIONS

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Application Submission Conditions

Enforce requirements across all programs with single submission conditions for...

- ▶ Application deadlines
- ▶ Application references
- ▶ Materials, prerequisite course information and more

Application Status Updates

Manage application status updates related to application requirements with single rules for...

- ▶ Application references
- ▶ Materials
- ▶ Prerequisite course and other data requirements

ACTIVITY

Create application automations based on data stored on the program dataset record

- ▶ Submission Conditions
 - Prevent submission of the application past the program deadline
 - Require that the correct number of references have been requested
- ▶ Application Status Updates
 - Manage the status of an application record based on the number of references required

LET'S GO TO SLATE

to build application status rules and submission conditions

MANAGING DATASET RECORDS

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User Access to Program Records

Manage who can access and update program dataset records.

- ▶ Lookup permissions
- ▶ Dataset population permissions
- ▶ Custom tabs v. custom dashboards

Updates to Program Records

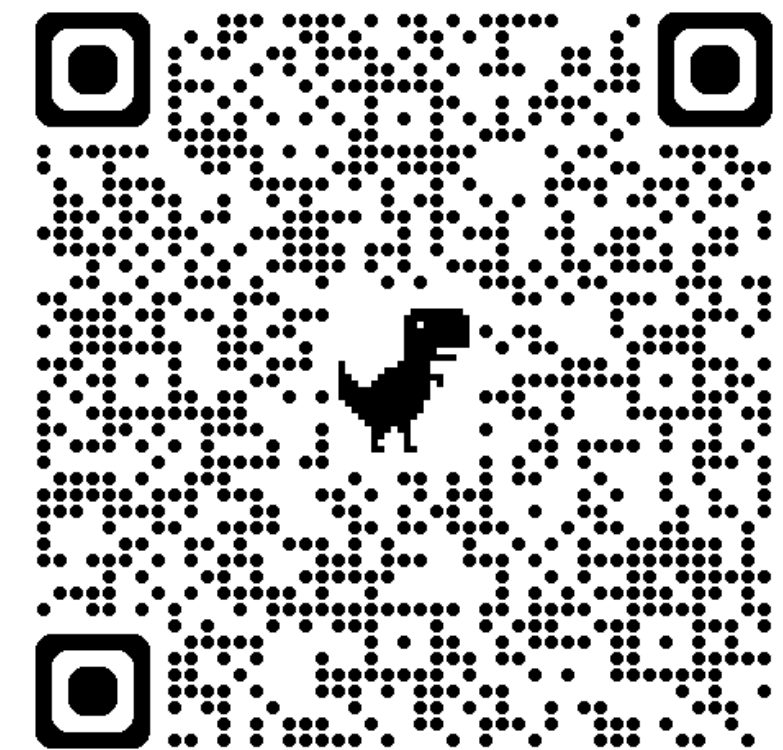
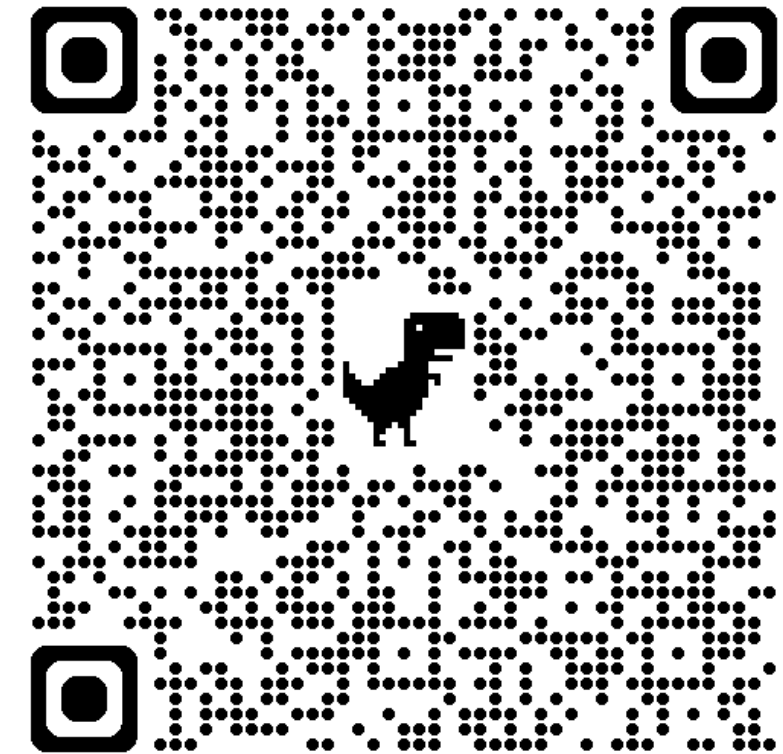
Tools to add new and update existing programs as needed.

- ▶ Upload Dataset
- ▶ Query batch management
- ▶ Custom tabs and user request forms

Feedback to Support

Help make this practice even better!

- ▶ Adding data to or editing data in a custom entity on a dataset record requires the global *Person Update* permission, which departmental users are unlikely to be granted:
- ▶ Application fee rules assign a payment due amount based on a static value, requiring at least one rule per fee amount.



QUESTIONS

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THANK YOU!

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